Wisconsin ServicePoint

QUICK GUIDE

Every client and every program in Wisconsin ServicePoint is different, but there are some basic steps in the process that are essentially the same regardless of how your program is set up or who your client is.

Every time a client is entered into Wisconsin ServicePoint the following action steps must take place.

1. Make sure you are in the program you intend to enter the client into.

✓ **On the home page, if the program in the blue banner at the top of the screen is not the program you are going to enter a client into, then click the orange word "here" to change your program profile.**

2. Make sure that if the client is part of a household that a household is established.

✓ **If not already established you will need to create *New Household***

1. Click "Add This Client to Household" from the bottom of the Client Profile screen.
2. Complete the following fields
   - *Household Type*
   - *Head of Household?*
   - *Relationship to household members* - This field is to help you understand the basic structure of the household. Don't worry about getting the exact relationship structure of a "family tree". You are simply keeping track of where individuals fit in the household. If a woman and her child form a single parent family you would obviously say the woman's relationship was Mother and the child was Son. However, if four generations of a family are living together, you might indicate the client as the Head of Household and base the relationships from the homeowner.
   - *Date entered relationship*
   - *Date ended relationship* - this field is not required.

3. Click "*Start NEW Household.*" The household will be created and your client added to the household.

3. Enter a Release of Information (ROI)

A release of information must be entered for every single client in every single program that clients enters regardless if information if information is to be shared outside the agency or not.

✓ **If not already established you will need to create *a Release of Information***

1. Click the orange ROI button from the ClientPoint profile screen.
2. Click "Add Release" from the ROI window.
3. If the release covers other household members, check any or all of the household members.

4. Enter the following information
   - *Provider* -- choose the provider the client has given permission to share his data.
   - *Release granted* –<u>**SELECT *YES* ONLY IF ClIENT SIGNED A RELEASE**</u>
   - *Start Date*
   - *End Date*
   - *Documentation* (On File, Verbal, None)
5. Click "Save Release Info

4. Answer all of the HUD required data elements

All HUD required data elements are the color red and found in the following four assessments: The **WI Assessment, WI Medical Assessment, WI Exit Assessment,** and the **WI Additional Profile**. Depending on the type of program that you are working in these assessments will be in different places in ClientPoint. Make sure you answer as many of the questions as you can.

✓ ***(SHELTERS)*** Answer the *WI Assessment* questions which are attached to "Profile" and *WI Medical Assessment* questions which is attached to the Assessments page.

✓ ***(PROGRAMS– LONGITUDINAL PROGRAMS)*** When a client enters a program, answer *WI Medical Assessment* questions," and *WI Assessment* questions. When a client exits a program, answer the *WI Exit Assessment* attached to the pencil in the "Entry/Exit" which corresponds to the client's entry.

✓ ***(PROGRAMS – ONE-TIME PROGRAMS)*** When a client enters a program, answer *WI Medical Assessment* questions and *WI Assessment* questions. There is no need to fill out the *WI Exit Assessment*.

5. Check the client into the PROGRAM or SHELTER

A client who is receiving a service must either be checked into a PROGRAM using "Entry/Exit" or a SHELTER using ShelterPoint It is imperative that a client be checked into one of these modules or there will be no way to record that a client actually received service

✓ **Check a client into a <u>PROGRAM</u>**

To ENTER a Client into a Program

1. Click on the brown "Entry/Exit" button from the ClientPoint Profile screen.
2. If this client belongs to a household, you may select any or all of the other household members that are also entering the program.

3. Under Entry Data, select the Program from the dropdown list.
4. Select the Type - the **"Type" of program is important for HUD funded programs**. Select the type based on the program:
5. Click "Save Entry/Exit"
6. If you don't enter a household member into the program, you may do so later by opening the Entry/Exit screen and clicking the Edit Icon (pencil). Then just select the household member and click "Add Related Entry/Exit".

To EXIT a Client from a Program

1. Click on the brown "Entry/Exit" button from the ClientPoint screen.

2. All the programs the client is currently in will be listed. Click the pencil next to the appropriate program(s).
3. Under Exit Date, enter the following information:
   - Exit Date and Time
   - Reason for Leaving
   - Destination
   - Any other notes
4. If this client belongs to a household, you may select any or all of the other household members that are also exiting the program.
5. Click "Save Entry/Exit"

✓ **Check a Client into a SHELTER**

1. To check-in a client, simply click on the word "EMPTY" next to the bed that you wish to assign the client. If no beds are available, you may click "EMPTY" on the Overflow line.
2. Enter the client information (name, birth date, social security #, gender, race, and ethnicity).
3. Click "Continue with Check In."

Quick List

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